

erwin DI Suite

Release Manager

Quick Start User Guide 9.3

Overview

This Quick Start Guide is intended to cover all major functionalities of the Release Manager module and help end users to quickly familiarize themselves with various aspects of the module

Contents

Introduction to Release Manager	2
Release Manager Default View:.....	2
Calendar View Layout and Actions:	2
Project View	3
Layout and Actions.....	3
Release View	4
Release View Layout and Actions	4
Calendar View	4
Adding a New Release.....	5
View Release Information and Navigate to Release View	5
Project View:	6
Creating a New Project:	6
Updating or Deleting a Project:	7
Downloading/Exporting Project Details:.....	7
Viewing Project History:.....	8
Navigating to a Release:.....	8
Adding a New Release:	8
Release View:	8
Creating a New Release:	9
Updating or Deleting a Release:	9
Generating a Detailed Release Plan:.....	9
Viewing Release History:.....	10
Release Object Grid Listing:	10
Add a New Release Object:.....	10
Moving Release Objects:.....	12
Promote Data Mappings:.....	12
Associate Environments:.....	13
Forms Repository	14
Add a New Form	14
Project and Release Display Order	15

Introduction to Release Manager

Release Manager Default View:

Once a user logs in to the “Release Manager” module, the default view presented is the Calendar View screen which contains an active listing of all releases based on calendar date.

Calendar View

Project View

Release View

Miscellaneous



Day

Week

Month

Year

February 2015

Today

◀ ▶

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
26	27	28	29	30 • Release 2 (EDW)	31 • Release 1 (EDW) • ICICI_Re1 (ICICI)	01
02	03	04	05	06	07	08
09	10	11	12	13	14 • AMM vs GA (EDW)	15
16	17	18	19	20	21	22
23	24	25	26	27	28	01

Calendar View Layout and Actions:

The screenshot displays the Release Calendar application interface. At the top, there are four orange buttons: "Calendar View of Releases", "Project View of Releases", "Release View", and "Miscellaneous Options". Below these is a blue navigation bar with tabs for "Calendar View", "Project View", "Release View", and "Miscellaneous". On the left, a sidebar contains four buttons: "Day", "Week", "Month" (which is selected and highlighted in grey), and "Year". The main area shows a calendar for January 2015. The calendar grid has columns for each day of the week (Monday to Sunday) and rows for dates. The dates 29, 30, 31, 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, and 31 are visible. The date 20 is highlighted in yellow. On the right side of the calendar, there are two orange buttons: "Export Calendar View to PDF format" and "Export Calendar View to PNG format". At the bottom, there is a status bar with a "Today" button and navigation arrows. The text "January 2015" is centered above the calendar grid. The bottom status bar also contains the text "Release 2 (EDW)" and "Release 1 (EDW)".

Project View

The Project View contains a listing of all Projects and the Releases specific to the Projects. This is a consolidated view to highlight all the projects underway and the details of Releases that are associated with each project.

The screenshot displays the 'Project View' interface. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. The 'Project Listing' table shows three projects: EDW, ICICI, and ODS. Below it, the 'Release Listing for :EDW' table shows three releases: AMM vs GA, Release 1, and Release 2. On the right, the 'Project Details' section for EDW includes a description, resource name, and email. Below this, two pie charts show the 'Release Summary - By Status' and 'Release Summary - By Owner'.

#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Created Date	Options
1	EDW	Kartik Sridhar	01/21/2015	3	3	Administrator	01/19/2015	[Edit] [Download] [Delete] [Refresh]
2	ICICI	Mike Boggs		1	0	Administrator	01/19/2015	[Edit] [Download] [Delete] [Refresh]
3	ODS	Kartik Sridhar		0	0	Administrator	01/19/2015	[Edit] [Download] [Delete] [Refresh]

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Created Date	Options
1	AMM vs GA	02/14/2015	Administrator	xa	CONFIRMED	Administrator	01/19/2015	[Edit] [Download] [Delete] [Refresh]
2	Release 1	01/31/2015	public	ss	VALIDATED	Administrator	01/19/2015	[Edit] [Download] [Delete] [Refresh]
3	Release 2	01/30/2015	Administrator	s	PENDING APPROVAL	Administrator	01/19/2015	[Edit] [Download] [Delete] [Refresh]

Project Details for EDW:
 Description: Enterprise Data Warehouse Project. Building small Data Marts is a major initiative being undertaken.
 Resource Name: Kartik Sridhar
 Resource Email: kartiks@analytixds.com

Release Summary - By Status:
 33% CONFIRMED, 33% PENDING APPROVAL, 33% VALIDATED

Release Summary - By Owner:
 33% Administrator, 67% public

Layout and Actions

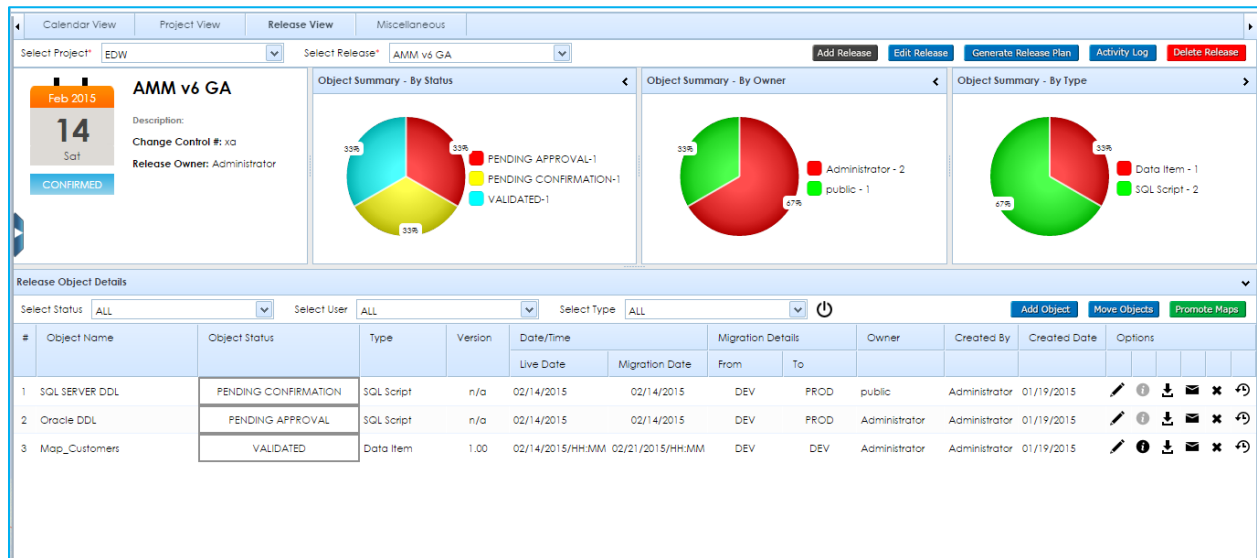
The screenshot shows the same interface as before, but with annotations highlighting key actions and sections. The 'Grid Listing of all Projects' section is highlighted with a dashed box. The 'Grid Listing of all Releases for a selected project' section is also highlighted with a dashed box. The 'Project Information Section' is highlighted with a dashed box. The 'Release Summary by Status' and 'Release Summary by Owner' charts are also highlighted with dashed boxes. Annotations include: 'Add a New Project', 'Export Project Grid Contents to Excel', 'Add a New Release for a selected Project', 'Generate a detailed Release Plan of all Releases for the Selected Project', and 'Export Release Grid Contents to Excel'.

Annotations:

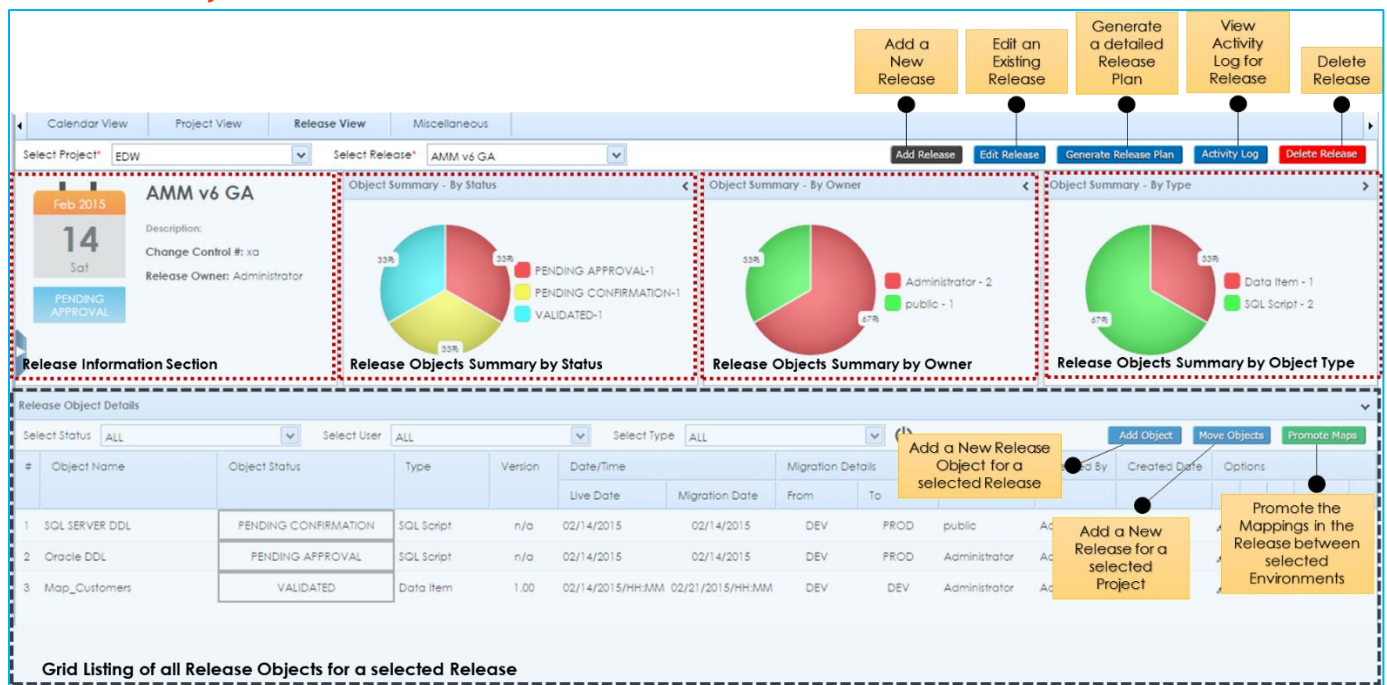
- Add a New Project
- Export Project Grid Contents to Excel
- Grid Listing of all Projects
- Grid Listing of all Releases for a selected project
- Project Information Section
- Release Summary by Status
- Release Summary by Owner
- Add a New Release for a selected Project
- Generate a detailed Release Plan of all Releases for the Selected Project
- Export Release Grid Contents to Excel

Release View

The Release View contains all specifics surrounding a Release which includes Summary of Release Objects and a detailed grid listing of all the Release Objects/Artifacts



Release View Layout and Actions



Calendar View

To navigate to the calendar view, click the **Calendar View** tab. This screen displays the current month by default and displays all scheduled releases by date. There are various views available here e.g. Day view, week view, month view, and year view etc.

Export options exists to export the calendar view to PDF or IMAGE formats.

Calendar View Project View Release View Miscellaneous						
February 2015						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
26	27	28	29	30 • Release 2 (EDW)	31 • Release 1 (EDW) • ICICL_Ret1 (ICICL)	01
02	03	04	05	06	07	08
09	10	11	12	13	14 • AMM v6 GA (EDW)	15
16	17	18	19	20	21	22
23	24	25	26	27	28	01

Adding a New Release

To add a new release in the calendar view, double click on a specific date cell (considered to be the release date for that release). E.g. if you want to add a new release for *March 21 2015*, navigate to the corresponding month (*April*) and double click the date (*21*)

In the resultant pop-up window, select the Project (from the dropdown list) in which you want to add the release and then enter the release details and click the save icon. This will add a new release. Also you can use the 10 User defined fields which you can even rename based on your requirement.

The 'New Release' pop-up window is displayed over the calendar view. It contains the following fields:

- Project Name:** A dropdown menu with 'ODS' selected.
- Release Name:** A text input field.
- Release Description:** A text input field.
- Change Control Number:** A text input field.
- Release Date:** A date picker showing '08/28/2017'.
- Release Owner:** A dropdown menu with '-Select-' selected.
- User Defined Field 1 through 10:** Ten text input fields arranged in two columns.

Buttons for 'Save' and 'Cancel' are located at the top right of the window.

View Release Information and Navigate to Release View

Hover over a release name to view high level info corresponding to a release.

• AMM v6 GA (EDW)	14	15
		22

Release Name: AMM v6 GA
Project Name: EDW
Release Date: 02/14/2015

Note: Click on a release to view details

Click on the release name to navigate to the detailed Release View.

Project View:

The Project View contains a listing of all Projects and the Releases specific to the Projects. This is a consolidated view to highlight all the projects underway and the details of Releases that are associated with each project.

Calendar View
Project View
Release View
Miscellaneous

Project Listing :
Add Project
Export to Excel

#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Created Date	Options
1	EDW	Kartik Sridhar	01/21/2015	3	3	Administrator	01/19/2015	
2	ICICI	Mike Boggs		1	0	Administrator	01/19/2015	
3	ODS	Kartik Sridhar		0	0	Administrator	01/19/2015	

Release Listing for :EDW
Add Release
Generate Release Plan
Export to Excel

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Created Date	Options
1	AMM v6 GA	02/14/2015	Administrator	xa	CONFIRMED	Administrator	01/19/2015	
2	Release 1	01/31/2015	public	ss	VALIDATED	Administrator	01/19/2015	
3	Release 2	01/30/2015	Administrator	s	PENDING APPROVAL	Administrator	01/19/2015	

Project Details

EDW
Description: Enterprise Data Warehouse Project. Building small Data Marts is a major initiative being undertaken.
Resource Name: Kartik Sridhar
Resource Email: kartiks@analytixds.com

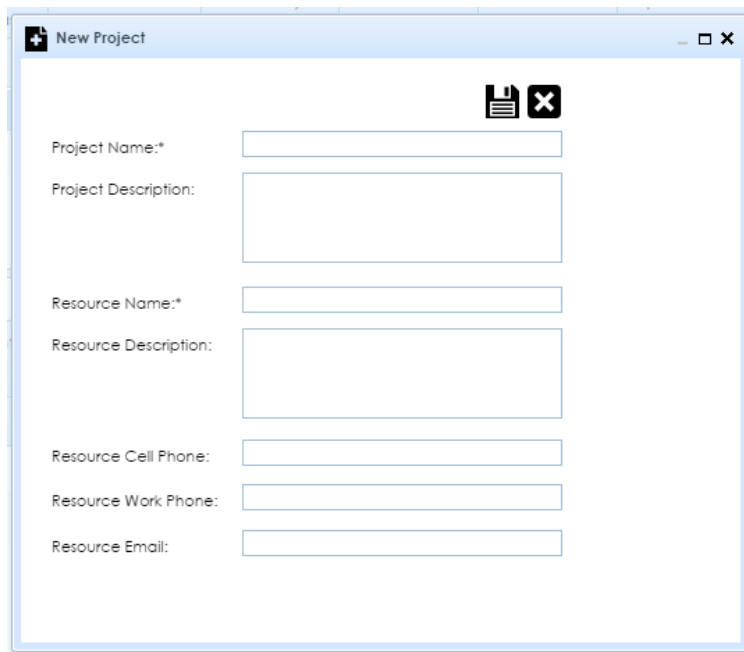
Release Summary - By Status

Release Summary - By Owner

Click the “Project Name” and “# of Releases” hyperlinks to view the Release information for the selected Project. The selected Project is highlighted in RED color and the Release information is displayed in the grid below.


Creating a New Project:













To Create a New Project, go into the “Project View” tab and in the “Project Listing” grid, click the “Add Project” button i.e. . In the resultant pop-up window, enter the required fields and click the “Save” icon. A new project is successfully created.
















A screenshot of a 'New Project' form window. The window has a title bar with a plus icon and the text 'New Project'. Inside, there are several input fields: 'Project Name:*', 'Project Description:', 'Resource Name:*', 'Resource Description:', 'Resource Cell Phone:', 'Resource Work Phone:', and 'Resource Email:'. Each field has a corresponding text input box. At the top right of the form area, there are two icons: a document with a checkmark and a document with an 'X'.

Updating or Deleting a Project:

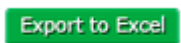
Updating a Project: In the “Project Listing” Grid, click the edit icon  against the concerned project in order to update the project details. In the pop-up window, update the required fields and click the save icon to update the project details successfully.

Project Listing :								
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Created Date	Options
	<input type="text"/>	<input type="text"/>				<input type="text"/>		
1	EDW	Kartik Srihar	01/21/2015	3	3	Administrator	01/19/2015	   
2	ICICI	Mike Boggs		1	0	Administrator	01/19/2015	   
3	ODS	Kartik Srihar		0	0	Administrator	01/19/2015	   

Project Listing :								
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Created Date	Options
	<input type="text"/>	<input type="text"/>				<input type="text"/>		
1	EDW	Kartik Srihar	01/21/2015	3	3	Administrator	01/19/2015	   
2	ICICI	Mike Boggs		1	0	Administrator	01/19/2015	   
3	ODS	Kartik Srihar		0	0	Administrator	01/19/2015	   

Deleting a Project: In the “Project Listing” Grid, click the edit icon  against the concerned project in order to delete the project.

Downloading/Exporting Project Details:

To download the entire Project Grid and its contents to an Excel document, click the “Export to Excel” icon i.e.  in the Project Grid. The contents of the Grid are downloaded into an Excel document.

Project Listing :								
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Created Date	Options
1	EDW	Kartik Sridhar	01/21/2015	3	3	Administrator	01/19/2015	
2	ICICI	Mike Boggs		1	0	Administrator	01/19/2015	
3	ODS	Kartik Sridhar		0	0	Administrator	01/19/2015	

To Download/Export the contents of a single project, click the Download icon against the selected Project. The contents of the Project are downloaded to an excel document.

Viewing Project History:

Click the history icon to view all history information for the respective project.

Navigating to a Release:

In the Release grid section, click on a specific release name to go into the release view for that release.

Adding a New Release:

In the Release grid section, click the “Add Release” button and in the resultant pop up window, enter all the relevant information to add a new release.

Release View:

The Release View contains a consolidated view of the release which includes various status and release objects listing

The GUI contains 2 Dropdowns “Select Project” & “Select Release” to help the user view the release information for a selected release. Using these 2 dropdowns, the user can navigate between any project/release to view the corresponding release information.

This section is broken into the following parts

1. **Release Information** – high level overview of release
2. **Release Object Summary by Status** – Graphical Summary of Release Objects by Object Status

3. **Release Object Summary by Owner** – Graphical Summary of Release Objects by Object Owner
4. **Release Object Summary by Type** – Graphical Summary of Release Objects by Object Type
5. **Release Object Listing** – Detailed listing of Release Objects

Creating a New Release:

To add a new release, click the “Add Release” button **Add Release** and in the resultant pop up window, enter all the relevant information to add a new release

Updating or Deleting a Release:

Updating a Release: Click the “Edit Release” button **Edit Release**. In the pop-up window, update the required fields and click the save icon to update the release details successfully.

Project Listing :								
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Created Date	Options
	<input type="text"/>	<input type="text"/>				<input type="text"/>		
1	EDW	Kartik Sridhar	01/21/2015	3	3	Administrator	01/19/2015	
2	ICICI	Mike Boggs		1	0	Administrator	01/19/2015	
3	ODS	Kartik Sridhar		0	0	Administrator	01/19/2015	

Project Listing :								
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Created Date	Options
	<input type="text"/>	<input type="text"/>				<input type="text"/>		
1	EDW	Kartik Sridhar	01/21/2015	3	3	Administrator	01/19/2015	
2	ICICI	Mike Boggs		1	0	Administrator	01/19/2015	
3	ODS	Kartik Sridhar		0	0	Administrator	01/19/2015	

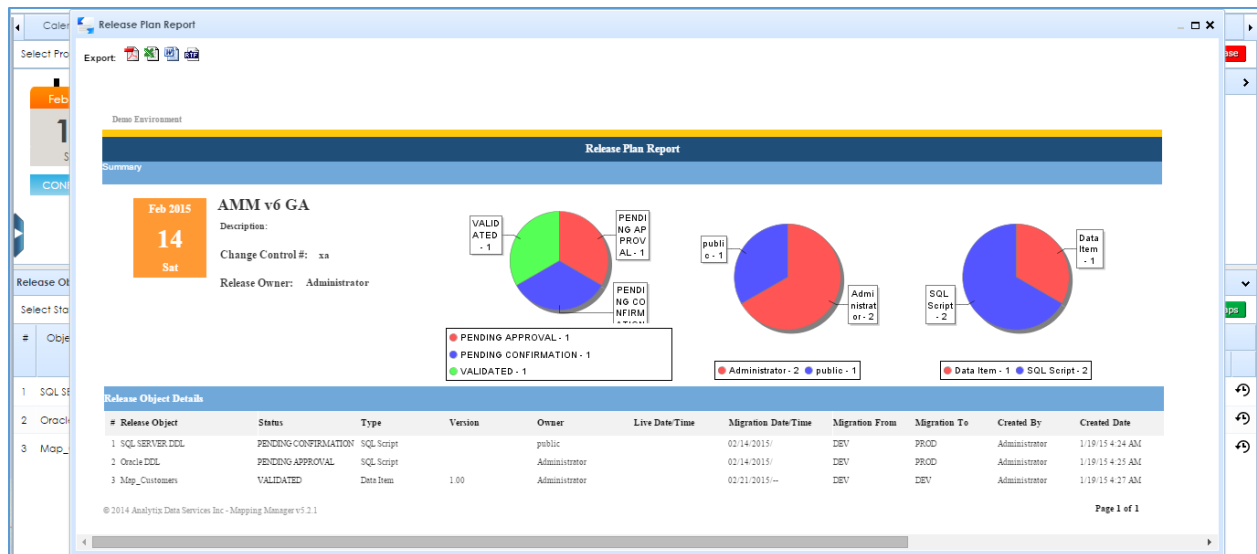
Deleting a Release: To Delete a Release, click the “Delete Release” button **Delete Release**. Confirm if the release can be deleted to proceed.

Generating a Detailed Release Plan:

To generate a detailed release plan, click the “Generate Release Plan” button

Generate Release Plan

The entire release information is opened in a report format in a pop up window.



The release plan can be exported to the PDF, MS-WORD, RTF and MS-EXCEL report formats. Click on the corresponding icon to save the report in the desired file format.

Viewing Release History:

To view the entire history for a selected release, click the “Activity Log” button [Activity Log](#) to view all history information.

Release Object Grid Listing:

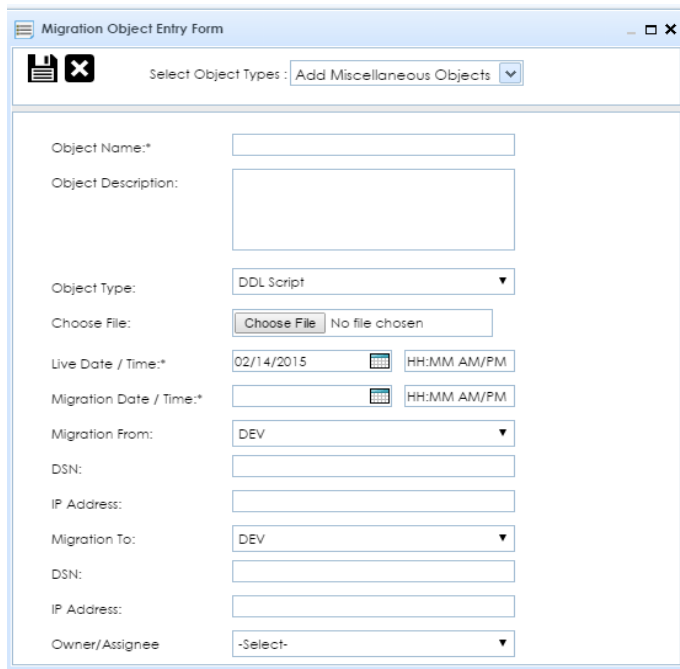
The Release Object grid displays all the release objects available in the release.

The following fields are captured as part of the release objects grid

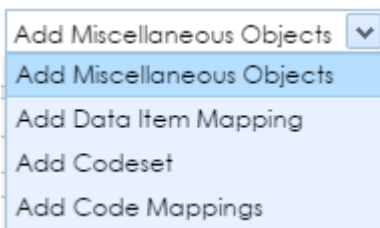
1. Object Name
2. Object Status
3. Type
4. Version
5. Live Date/Time
6. Migration Date/Time
7. Migration Details – From and To Environments
8. Object Owner
9. Audit info – created by, created date, last modified by, last modified date

Add a New Release Object:

To add a new release object, click the “Add Object” button [Add Object](#). In the pop-up window, enter the required details



Select the Object Category from the dropdown, fill in the details and proceed with adding a new object.



From the “Select Object Types” dropdown, select the corresponding Option

1. **Add Miscellaneous Objects** –Files, DDLs, DMLs etc. as Release artifacts
2. **Add Data Item Mappings** – Add Mappings as Release artifacts
3. **Add Codeset** – Add Codesets as release artifacts
4. **Add Code Mappings** – Add Code Crosswalks/Mappings as release artifacts

Select the corresponding “Object Type” from the dropdown. If “Add Data Item Mapping”, “Add Codeset” or “Add Code Mappings” option is selected, a tree containing the list of these objects is displayed. Select the required objects and click the “Next” icon.

In the next screen, enter the object details

New Migration Object panel contains:

Object Description: Give a brief description of the Object to be released

Object Type: Type of Object such as Data Item, CodeSet etc.

Choose File: Browse to select the file to be uploaded

Live Date/Time*: Go Live Date and Time

Migration Date/Time*: Migration Date and Time

Migration From/To: Migration FROM Environment to another Environment

DSN: Provide Data Source Name

IP Address: IP Address of the environment

Click on save icon.

Similarly, for other options 'Add Codeset', 'Add Code Mappings' select the appropriate item from left panel to add.

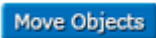
Add Miscellaneous Object:

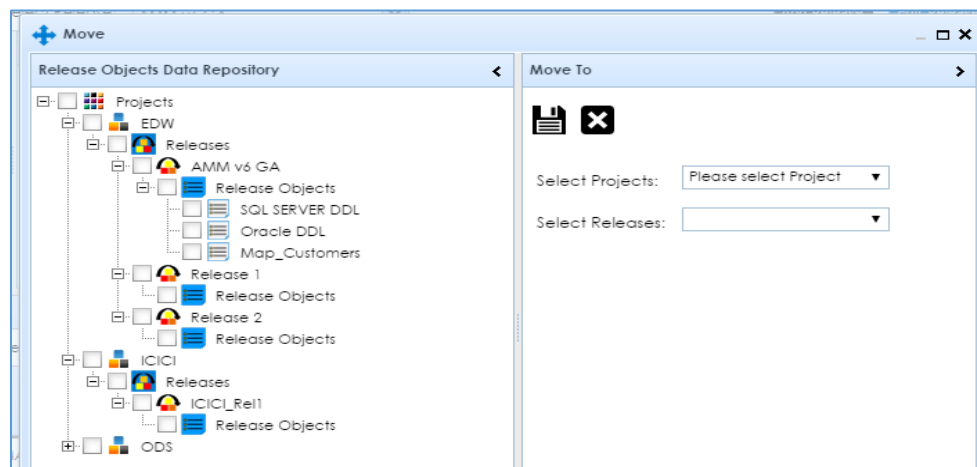
New Migration Object panel contains:

Object Description: Give a brief description of the Object to be released
Object Type: Type of Object such as **DDL Script**, **SQL Script**, **DML Script** etc.
Choose File: Browse to select the file to be uploaded
Live Date/Time*: Go Live Date and Time
Migration Date/Time*: Migration Date and Time
Migration From/To: Migration FROM Environment to another Environment
DSN: Provide DataSource Name
IP Address: IP Address of the environment

Moving Release Objects:


Release Objects can be moved from one release to another. To move objects

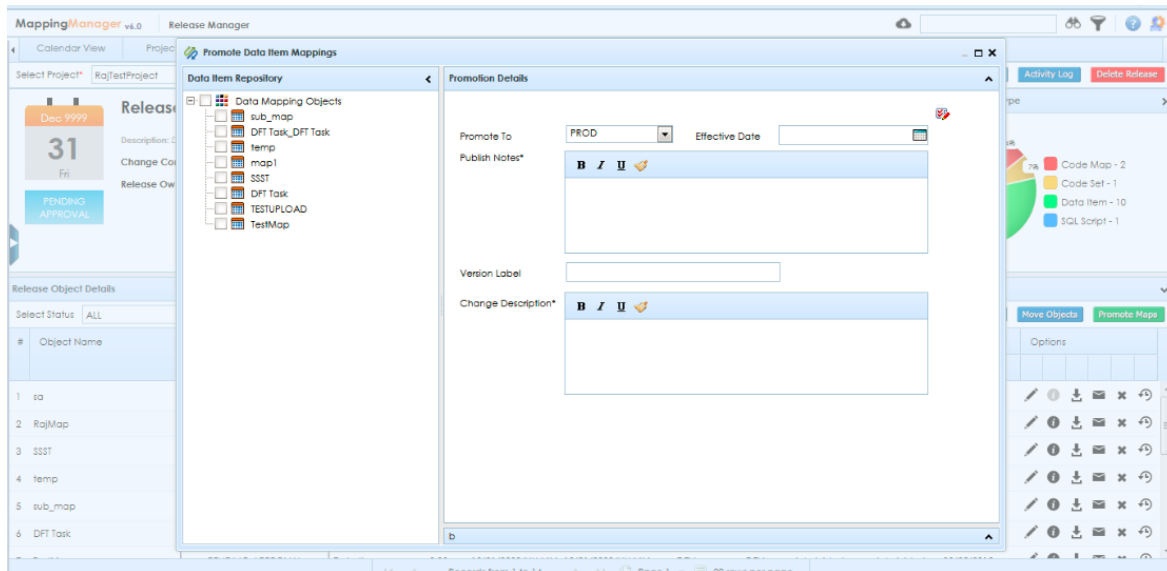
1. Go into a Release
2. Click the "Move Objects" button 
3. In the Pop-up window, select the Objects to be moved, and then in the right side panel, select the target project/release and confirm



Promote Data Mappings:

Data Mappings can be migrated/promoted between various environments by using the "Promote" feature.

To promote mappings in a project, click the "Promote Maps" button .



From the resultant pop up window, select the required mappings that need to be promoted/migrated to a different environment.


Promote To: Environment to be promoted to.

Effective Date: Promotion effective date

Publish Notes:* Provide notes for publishing these data item mappings.

Version Label: Provide a unique version label if required.

Change Description:* Provide change description details for this particular promotion.

Validate the promotion by clicking on the “Validate” icon  to promote to the next environment.

Associate Environments:

To associate environments, go into the Miscellaneous → Environments Tab

To edit the environments, click on  icon.

This grid will display all the available environments as per the configuration

- System/Environment Name
- Dev
- Test
- Prod etc.

System/Environment Name	Dev	Test	Prod
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
EDW.Development	EDW.Development		
EDW.EDW-DEV	EDW.EDW-DEV		
EDW.EDW-PRD	EDW.EDW-PRD		
EDW.EDW-TST	EDW.EDW-TST		
ODS.ODS-PRD	ODS.ODS-PRD	EDW.EDW-PRD	EDW.EDW-PRD
3rd Pty Data Files.3rd Pty Data Files	3rd Pty Data Files.3rd Pty Data Files		
3rd Pty Data Files.Capgemini Flat File	3rd Pty Data Files.Capgemini Flat File		

By default, the DEV environment is considered to be the base environment itself. To map the corresponding test, prod and other environments, go into the respective column and select the environment by on double-clicking the cell and pick the environment from the dropdown to map.

















To save the environments, click on  icon.

Forms Repository

Forms repository can be maintained to share and collaborate on release specific forms.

To navigate to the forms page, go into the **Miscellaneous** → **Forms** tab

This page displays a list of all available forms

Calendar View Project View Release View Miscellaneous				
Environments Forms Settings				
New Form				
#	Form Name	Form Description	File Name	Options
1	Release Notes Form		Products_DDL_Script.TXT	   
2	DBA Object Migration Form		Orders_DDL_Script.TXT	   
3	ETL Object Migration Form		Employees_SQL_Backup.TXT	   
4	Unix Admin Migration form		EDW_Mappings_Description.TXT	   

Add a New Form

Click on 'New Form' icon to **create** a new Form to the Release Manager module

A Pop-up will appear asking for the below details to be entered:

Form Name *: Form name
Form Description: Form description
Choose File *: Template Form to upload using Browse.

Once information is filled, click on the save icon to save the form.

Project and Release Display Order

Projects and Releases (in both the grid and dropdown display) are defaulted to display in the ascending order of Project and Release Names respectively. However, this order can be changed by the user. To customize the display order, go into the Miscellaneous → Settings tab

The default settings screen is displayed

The screenshot shows a web application interface with a top navigation bar containing 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below this is a sub-navigation bar with 'Environments', 'Forms', and 'Settings'. The 'Settings' tab is active, displaying two side-by-side configuration panels. The left panel, titled 'Project Sorting By', has radio buttons for 'Project Name' (selected), 'Owner', 'Created Date', and 'Last Modified Date'. Below these is a 'Sorting On' section with 'Asc' (selected) and 'Desc' options. The right panel, titled 'Release Sorting By', has radio buttons for 'Release Name' (selected), 'Owner', 'Release Status', 'Release Date', 'Created Date', and 'Last Modified Date'. It also has a 'Sorting On' section with 'Asc' (selected) and 'Desc' options. An edit icon (pencil) is visible in the top left corner of the settings area.

To update the settings, click the Edit icon, and select the order for the Project and Release display according to your preference. The Projects and Releases will now be displayed in the new sorting order as selected.